United Nations A/62/510/Rev.1

General Assembly

Distr.: General
10 April 2008

Original: English

Sixty-second session
Agenda items 128 and 140

Programme budget for the biennium 2008-2009

Administrative and budgetary aspects of the financing of the United Nations peacekeeping operations

Information and communications technology

Enterprise systems for the United Nations Secretariat worldwide

Report of the Secretary-General

Summary

The present report addresses the request of the General Assembly contained in resolution 60/283 concerning the proposals submitted by the Secretary-General in his report on investing in information and communications technology (A/60/846/Add.1). It will be noted that the present report updates and revises the previous document (A/62/510), which, while it had been reviewed by the Advisory Committee on Administrative and Budgetary Questions, has not yet been considered by the Fifth Committee.

The report presents proposals and plans for the phased implementation and deployment in all offices of the United Nations Secretariat, including offices away from Headquarters, regional commissions, peacekeeping and political missions, and other field missions, of a new generation of systems to replace the Integrated Management Information System and other ancillary systems. The core of the new system will be based on a commercially available enterprise resource planning (ERP) software.

The absence of an integrated information system for managing resources is seriously hampering the ability of the United Nations to deliver results effectively and efficiently. The goal of implementing an ERP system is to build an integrated global information system that fully supports the needs of the United Nations and enables the effective management of human, financial and physical resources, and that is based on streamlined processes and best practices. The report also proposes

08-30226 (E) 060508

enterprise-wide systems for managing day-to-day services, through a customer relationship management system (CRM), and managing knowledge of the Organization, by way of an enterprise content management (ECM) system.

A decision by the General Assembly is requested on the proposals and financing of the ERP, ECM and CRM projects.

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I. Introduction

1. In his report of 6 March 2006 entitled "Investing in the United Nations: for a stronger Organization worldwide", the Secretary-General proposed "to replace the Integrated Management Information System (IMIS), Galaxy and other stand-alone information and communications technology (ICT) management support systems with a fully integrated global system supporting the full range of management functions" (A/60/692 and Corr.1, proposal 10).

2. In a subsequent report (A/60/846/Add.1), the Secretary-General provided preliminary findings and a high-level road map for maximizing the value of ICT to the United Nations Secretariat worldwide. As part of his in-depth fact-finding study, the Secretary-General explained the need, anticipated benefits and unique opportunities for replacing IMIS and other ancillary information systems. The Secretary-General further anticipated that he would complete the study and provide detailed costings and a timetable for consideration by the General Assembly at its sixty-first session. Unforeseen delays in the recruitment of the Chief Information Technology Officer and the need to have the proposal reviewed by that officer, however, have led to the delay in the formulation of the full proposal for consideration by the General Assembly.

3. In paragraph 4 of section II of its resolution 60/283, the General Assembly decided "to replace the Integrated Management Information System with a next-generation enterprise resource planning system or other comparable system". The Assembly further requested the Secretary-General to submit at its resumed sixty-first session the comprehensive report, which should include, inter alia, (a) information on previous reform proposals, their impact on the existing proposals and references to previous relevant resolutions and decisions of the Assembly; (b) costs and administrative implications; (c) assessment of previous investments in ICT, lessons learned and expected time frames for the introduction of the system and arrangements for continuation of the current system during the transitional period.

4. The present report addresses the above request and proposes an approach for the implementation of enterprise systems and a number of measures for approval by the General Assembly. At the same time, it is recalled that the Secretary-General, in his report on information and communications technology security, disaster recovery and business continuity for the United Nations (A/62/477), presented proposals for a global operational framework for information and communications technology infrastructure and provided an analysis of infrastructure improvements linked to the implementation of enterprise resource planning. Accordingly, that report should be considered as an integral part of and has a direct link to the proposals for implementation of enterprise systems contained herein.

II. Information and communications technology in the United Nations Secretariat

A. Yesterday's solutions: Integrated Management Information System

5. The development of IMIS was a milestone as it marked the emergence of information technology as a discipline touching all areas of administration and management in the Organization. IMIS was developed as a functionally integrated system to support key processes such as human resources management, payroll, finance and accounting, requisitioning and funds control, budget execution and travel management. IMIS was introduced in conjunction with desktop, networked computing and office automation tools, such as electronic mail, to all offices where IMIS was being used.

6. In 2002, the Secretary-General submitted his ICT strategy for the Secretariat (see A/57/620). The 2002 ICT strategy focused on strengthening the global ICT infrastructure so that it could take full advantage of advances in telecommunications and Internet technologies. The strategy was successful in establishing worldwide standards and adding significant coherence in the manner ICT investments were being managed and aligned. The strategy also stated a clear direction in relation to IMIS, which was to remain as the core administrative system for a period between five and seven years.

7. The launching of IMIS and the 2002 strategy were subsequently affected and conditioned by major developments in the technology market, and an accelerated shift of focus in the United Nations to field activities. In short, IMIS was designed and developed at a time when the context began to change rapidly and profoundly. As a consequence, a few years after its implementation, the following became evident:

(a) IMIS could not take full advantage of significant advances in global communications;

(b) Although functionally integrated, IMIS was deployed and operated locally at each duty station. Integrating information for online reporting and global management purposes became difficult;

(c) Although partially implemented in peacekeeping operations, IMIS was not adapted to support the specific needs of the peacekeeping environment, such as supply chain and logistics management.

8. The functional gaps of IMIS were addressed by relatively modest investments in tactical systems, some of which were integrated into IMIS through interfaces while others remained as stand-alone systems.

9. The implementation of IMIS and the 2002 ICT strategy rendered significant benefits. However, the Organization today faces challenges that demand profound transformation beyond the capabilities of IMIS and its ancillary legacy systems currently being used.

B. Today's situation: an imperative for change

10. After 14 years since the live date of release 1 at Headquarters, IMIS has reached the end of its useful life. Cost of maintenance and ongoing support no longer match the benefits that staff and managers expect from the information system upon which their day-to-day operations and decisions depend. Moreover, the commitment to adopt the International Public Sector Accounting Standards (IPSAS), pursuant to paragraph 1 of section IV of General Assembly resolution 60/283, will require the Organization to introduce significant changes to accounting processes in order to achieve compliance.

11. The Organization also needs to improve the quality and cost-effectiveness of the services it provides to a vast array of "customers". The systems which are currently in place to support customer-service areas are obsolete, not integrated, duplicative, and inefficient.

12. The lack of integrated and complete data on resources, both at Headquarters and in the field, is a serious impediment to effective management, planning and decision-making. This deficiency is becoming increasingly acute as the complexity of the Organization's activities continues to grow.

13. Furthermore, as a knowledge-intensive organization, the Secretariat spends significant resources in the production, management and distribution of rapidly increasing amounts of documents and other information residing in a variety of media. The processes and systems currently utilized in managing this knowledge capital are ineffective, inefficient and vulnerable.

14. However, perhaps the most compelling imperative for a new ICT system is the changing nature of the Organization itself. The Secretariat is very different today than it was just a decade ago. United Nations Headquarters in New York is one of many duty stations around the world, rather than the centre of gravity it once was. Peacekeeping operations have proliferated at an unprecedented pace and have grown in both size and complexity, often in regions with poor basic infrastructure. To ensure a minimum of reliable automation and telecommunication capacity, a series of new information systems have had to be developed rapidly, but it has proven difficult to integrate these systems, as well as other ancillary information systems operating in different duty stations, with IMIS — the United Nations system of record. This has led to a patchwork of fragmented, support-intensive, home-grown systems that are not sustainable and efficient for the long term.

15. In recognition of the increasingly global arena of work and the many new challenges of the twenty-first century, Member States have approved several reform initiatives to better equip the Organization in meeting these challenges. In consonance with those reform initiatives, the Secretary-General is fully committed to fundamentally modernize the way the Organization carries out its day-to-day work, by streamlining and simplifying processes. Information technology is a critical tool for achieving this Secretariat-wide transformation, by introducing global enterprise systems that are more efficient, nimble and rational.

16. Recognizing the strategic importance of ICT, the General Assembly approved the establishment of the position of Chief Information Technology Officer at the level of Assistant Secretary-General in the Executive Office of the Secretary-General (see resolution 60/283, sect. II, para. 1). The Chief Information Technology

Officer was appointed and assumed his duties in late August 2007. The Chief Information Technology Officer has now developed a comprehensive report on ICT investments to maximize its value to the Secretariat worldwide (see report of the Secretary-General entitled "Investing in information and communications technology: information and communications strategy for the United Nations Secretariat" (A/62/793)). The strategy serves as the Organization-wide agreement on the future direction of ICT. The aforementioned report builds upon the significant progress made since the launch of the ICT strategy in 2002, and it seeks to extend that achievement in order to meet the strategic ICT needs of the Secretariat over the next three to five years. The projects proposed in the present report not only serve as the main building block for achieving the new ICT vision of "a stronger ICT for a better United Nations" but also directly support the goals of the strategic programmes to be undertaken under the ICT strategy.

17. In addition to establishing a global management framework for ICT, a new generation of business systems is being introduced that will form key pillars in implementing management reform and modernizing the Organization. These include an enterprise resource planning system (ERP), for managing the financial, human and physical resources; a customer relationship management (CRM) system, for better handling the vast array of day-to-day services; and the enterprise content management system (ECM), for managing the exploding amount of documents and other information in a variety of media, such as website, e-mail, picture and video.

III. Managing resources: enterprise resource planning system

A. Goals and objectives of developing an enterprise resource planning system

18. The replacement of IMIS presents an opportunity to fully and globally integrate all resource management functions across the Organization through the implementation of an ERP system. An ERP system provides an integrated suite of information technology applications that support activities such as finance and budget management, human resources management, supply chain management, central support services, and other corporate core functions. Most importantly, the main value of an ERP system is the opportunity to streamline and improve the operations of an entire organization through process re-engineering, sharing of common data, and implementation of best practices and standards.

19. The main objectives of the ERP project can be summarized as follows:

(a) To have a global system that captures accurate and timely core resource data from the global Secretariat at all duty stations, including peace operations and other field missions;

(b) To support decision-making by linking programmes and operations with the resources allocated and showing what has been utilized;

(c) To reduce the average time required for administrative processes, by streamlining and integrating business processes, make them simpler and use greater automation, reflecting best practices;

(d) To increase organizational efficiency by reducing the amount of staff time spent on manual processes, and redirecting resources to high priority and value-added work;

(e) To support the implementation of IPSAS by the Secretariat;

(f) To enable easy access to reports by Member States, United Nations staff and the public, as appropriate;

(g) To support management reform by enhancing accountability, transparency, and internal controls for all transactions relating to resources.

20. The main functionalities sought from the new ERP system are expected to encompass functions such as programme planning, budgeting, contributions and performance; human resources management and administration; payroll, including management of benefits and contribution to pension, medical and insurance schemes; supply chain management, including procurement; assets and facilities management; general accounting, travel and other administrative flows; reporting to management and stakeholders, and more.

21. The new ERP system will need to have the capability to support functions specific to peacekeeping operations in the area of logistics, transportation, fuel and rations systems and other requirements which are not common in other organizations of the United Nations system.

22. The ERP project will be guided by the following principles:

(a) The ERP software selected must be capable of providing satisfactory performance, even under the demanding conditions in peacekeeping environments;

(b) The aim should be to operate a single central system ("single-instance data") to ensure global transactions and reporting capabilities and alignment of information across different offices;

(c) Customization of the ERP software should be kept to a minimum, to avoid unnecessary costs. Instead of customizing, existing administrative processes should be changed in line with the chosen software;

(d) Common business practices should be used to increase uniformity and compatibility within the global Secretariat;

(e) Self-service options should be emphasized to a greater extent, making it possible for staff to access, verify and update resource data;

(f) The ERP system should be designed and implemented in a manner to ensure accuracy, integrity, consistency and timeliness of data, and avoid duplicative data entry;

(g) The system should be developed in a way to ensure that the needs of offices away from Headquarters, peace operations and other missions are fully taken into account;

(h) Regular and open communication with Member States, managers and staff should be maintained throughout the project period.

B. Expected benefits of an enterprise resource planning system

23. The new ERP system will be at the core of the Organization's reform of financial, administrative and management operations. The system will be a catalyst for fundamental transformation of the way business is conducted globally by the Secretariat. It also has the potential to improve the efficiency and, most significantly, the overall effectiveness of the Organization.

24. Typical key benefits of an ERP system include effective and efficient business processes; access to accurate, timely, and authoritative data; informed decision-making; faster responses to issues and problems; consolidation and elimination of current systems; compliance with best practices and standards; opportunity for resource redeployment and skills development; improved transparency and accountability.

25. Following are some examples of specific improvements the new ERP system is expected to bring to the Organization:

(a) **Increased operational effectiveness and timeliness**:

(i) With integrated resource mobilization functionality, the Organization could achieve a concentrated and expedited approach to identifying, securing and utilizing donor funding;

(ii) An improved ability to align budgets closely with acquisition plans, and purchasing and delivery of goods and services would allow managers to better monitor programme execution. Unplanned activities could be highlighted and dealt with proactively;

(iii) A tighter link between supply chain planning and logistics with finance could lead to timely substantiation of liabilities related to contingent-owned equipment reimbursements. In addition, portals with Member States noting the verified accrued expenditures would strengthen transparency;

(iv) In the area of travel, continuous monitoring of incurred travel and other offsite conference costs coupled with sound financial modelling could lead to improved financial planning and optimal meeting site selection;

(v) With a global database and access to personnel data including performance, work history and developed competencies, managers throughout the Organization would be better equipped to take optimal decisions on staff transfers and special project assignments. In particular, an ERP system could allow timely deployment of qualified personnel in critical areas in peacekeeping and field missions;

(b) **Improved accountability**:

(i) Substantive project management, an area significantly lacking in IMIS, would allow programme managers to plan, allocate and monitor resources based on defined activities, tasks and timetables. Project portfolio management functionality would enable the monitoring of project activities by exception;

(ii) Improved planning, linkage with real-time cost parameters and enterprise-wide assessment of inventory levels could lead to greater utilization;

(iii) The ERP system is expected to provide better internal controls across the broad range of financial, procurement and staffing processes and improve accountability;

(c) **Adoption of international best practices and standards**:

(i) The implementation of ERP software will facilitate compliance with IPSAS;

(ii) Commercial ERP often results in a high degree of professional development of staff and therefore enables greater mobility of human resources;

(iii) Global integration would enable coordinated strategic personnel planning that could result in improved accuracy of projected vacancies and shortfalls in workforce and competencies;

(iv) Integrated records in performance, competencies, and assignment requirements would enable proactivity in highlighting and implementing workforce development and training plans;

(v) IPSAS compliance is supported by configured ERP systems. It is expected that the management of accounting cycles and the generation of consolidated financial statements would be considerably strengthened and standardized as a result of configuring the ERP system to be compliant with IPSAS process and data requirements;

(d) **Enhanced treasury operations**:

(i) An integrated treasury system would allow the management and monitoring of cash flow projections with considerably higher precision. That in turn could lead to a reduced float and a better ratio of investment to cash holdings;

(ii) Cashier activities could be strengthened by the introduction of global currency bank accounts. In principle, utilizing centralized currency accounts from any location could strengthen the controls and improve transaction timings;

(e) **Enhanced transparency**:

An ERP could promote consistency and transparency in the application of rules and operating procedures in all administrative disciplines throughout the Organization;

(f) **Higher client satisfaction**:

ERP software provides self-service applications, which will make it possible for eligible persons to request benefits online. This will reduce frustration among staff currently relying on time-consuming paper-based requests. ERP will enable staff to verify their annual leave balances online, update contact information and conduct vital personnel transactions;

(g) **Process improvements**:

(i) ERP implementations in the United Nations Development Programme, the United Nations Children's Fund and the World Food Programme have demonstrated efficiency benefits, such as the elimination of reconciliation

tasks, reduced paperwork and enhanced staff productivity. Specific efficiency benefits gained by those organizations include the avoidance of duplicate data entry, reduced human error, and increased supply chain visibility through immediate access to all relevant information. Those organizations also benefited from analytics embedded in the ERP software by enabling their staff to be responsive and take timely action, thus avoiding costly delays;

(ii) The benefit for those organizations was redirected to enhancing effectiveness in managing resources. Similar benefits for the Secretariat, based on 10,000 administrative staff members redirecting around 15 per cent of current process steps, should yield five to six hours per year for each United Nations staff member.

Productivity gains and cost avoidance

26. An ERP system enables operating an acquisition process that integrates budget, procurement and supply chain from a central platform with the full visibility and proactive control of the organizational requirements. With the proper ERP modules, it therefore should be possible to leverage buying power for consolidated purchasing of the most commonly required goods and services, for which the Organization can expect volume discounts. Improved capability to manage the requirements, paired with a global visibility of existing contracts, should help to reduce unplanned spending and improve efficiencies in acquisition costs and process timeline while strengthening internal control. Certain private commercial entities have been able to achieve procurement operating cost reductions of up to 10 per cent once a full suite of ERP modules has been implemented.

Centralized management of information technology systems

27. During the transition from IMIS and other legacy systems, resources are required to run these systems in parallel until the ERP is completely implemented. After transition, a number of legacy systems are expected to be retired and resources redirected to support the new ERP operations.

C. Project governance and organization

28. On a project of this magnitude, strong governance is essential: to steer the project, monitor progress against plans, resolve conflicts without delay, decide on work priorities, help to manage changes and communicate progress to all stakeholders. The primary purpose of the ERP system is to enable the Secretariat to effectively and efficiently carry out the work that Member States expect. The ERP project is a "business" project, and therefore needs to be led by senior management. The main policy decision-making body is the ERP Steering Committee, chaired by the Under-Secretary-General for Management and consisting of the Chief Information Technology Officer; the Assistant Secretary-General for Field Support; the Assistant Secretary-General for Human Resources Management, the Assistant Secretary-General, Controller, and for Central Support Services, Department of Management;[1] and the Deputy Director-General of the United Nations Office at Vienna. The ERP Steering Committee reports to the Management Committee.

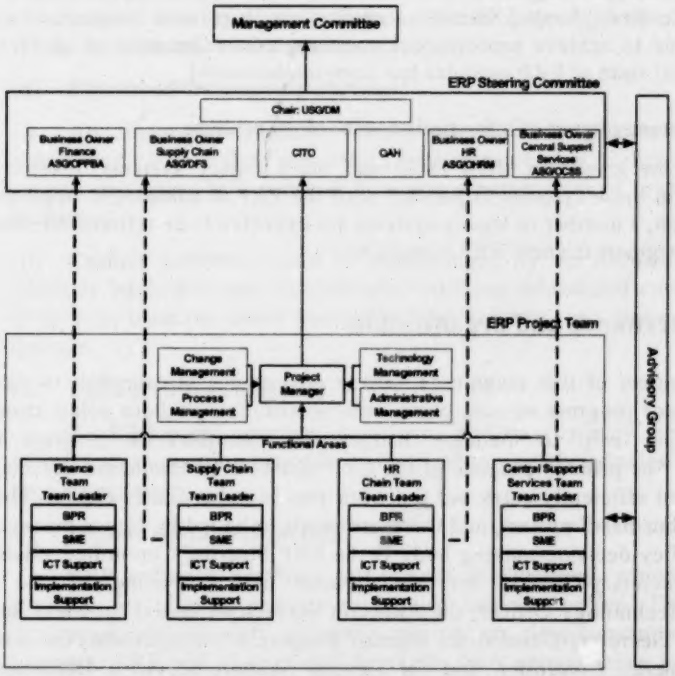
[1] In the absence of the Assistant Secretary-General for Central Support Services, the Directors of the Information Technology Services Division and the Facilities and Commercial Services Division participate.

29. The detailed planning and execution of the project will be by the ERP project team, reporting to the Chief Information Technology Officer, coordinated and led by a programme management office headed by a Project Director, who is ultimately accountable for the execution of the project in collaboration with the Assistant Secretaries-General responsible for the four main functional areas: human resources, finance and budget, supply chain, and central support services. The project team includes experts on change management, process management, administration management, and technology management, as well as four sub-teams, one for each of the functional areas.

30. To ensure an institutional link with user departments in the course of planning and implementation, advisory groups will be established. This will serve as a mechanism for two-way communications and help to embed the ERP project as an organization-wide endeavour that will require engagement by managers and staff at large, but will ultimately yield benefits for the United Nations Secretariat worldwide.

31. Figure I below illustrates the composition, structure and reporting lines of the proposed governance framework:

Figure I
Proposed governance framework



Abbreviations: ASG, Assistant Secretary-General; BPR, business process re-engineering; CITO, Chief Information Technology Officer; DFS, Department of Field Support; DM, Department of Management; HR, Human Resources; OAH, offices away from Headquarters; OCSS, Office of Central Support Services; OHRM, Office of Human Resources Management; OPPBA, Office of Programme Planning, Budget and Accounts; SME, subject matter expert; USG, Under-Secretary-General.

D. Progress to date

32. The ERP project cannot be properly initiated until a dedicated fully staffed project team and funding are in place. Nevertheless, an ad hoc arrangement, drawing on the limited budgetary discretion approved by the General Assembly in section III of its resolution 60/283, has been used to put in place an interim small core team of 16 staff. For the first half of 2008, such authority has been utilized to meet initial resource requirements in the amount of $3.4 million for a dedicated project team, the continuation of ongoing preparatory project activities and ensuring progress on major foundation tasks relating to the ERP system. That commitment would be reversed into the overall project costs sought in the present report, should the General Assembly approve the proposal, and would be reported in the context of the performance report or annual report, as appropriate. The team has achieved significant progress in some preparatory activities, including by engaging internal stakeholders widely in consultations on user needs and scope. The results enabled progressing acquisition activities for software. The experiences of other United Nations agencies that have already implemented ERP software were important references for the preparatory activities of the Secretariat. However, not all desirable preparations for accelerated project initiation could be completed under these interim arrangements. The following paragraphs summarize the progress so far.

1. User needs and scope

33. The identification of user needs as functional requirements was a major activity spanning the second half of 2007. The extensive requirements-gathering, analysis and validation process involved representative staff from Headquarters, offices away from Headquarters, regional commissions and field missions. Important elements that were elaborated included the requirements for cost accounting, IPSAS, recruitment, procurement and associated management reporting. The compilation of detailed functional requirements for the ERP software was completed in December 2007. The scope of the requirements was comprehensive, ensuring the best possible capture of stakeholders' needs. Work is ongoing to refine the scope in conjunction with stakeholder determination of the desired system architecture and high-level business process re-engineering.

2. Acquisition activities

34. The acquisition of commercial ERP products and services is complex and requires significant lead times. Sustained efforts have focused on defining requirements for software and system integration services as well as on ensuring a transparent and competitive procurement process.

35. The approach for procurement involves the acquisition activities for the software and integration services being partially overlapping and shortening the overall acquisition timeline. That approach has been planned in a manner ensuring the integrity of acquisition activities. The terms and descriptions used in drafting the Statement of Work were carefully scrutinized to ensure that they are generic in nature and not software-specific. System integration proposals cover a comprehensive range of services requiring significant time and effort to prepare. The capacity of the core team will be supplemented temporarily with some subject matter experts. The temporary supplementation will ensure that key personnel can participate in overlapping procurement activities for software and integration

services. The capacity for concurrent participation is necessary to ensure consistency and the application of lessons learned.

3. Project management activities

36. In order to address the multitude of complex concurrent project tasks in a timely and orchestrated manner, a full-time dedicated project team must be established as soon as possible. A project organization strategy has been established which will ensure a competitive selection of the members of the proposed ERP project team as soon as the recommended staffing has been approved. To that end, preliminary action has already been taken on post classifications and to have posts advertised progressively through the Galaxy system, with the clear proviso that such posts are fully subject to approval of funding by the General Assembly. Based on the current plan and subject to General Assembly approvals of the proposals, selection recommendations in accordance with established human resources procedures will be completed promptly, with the majority likely by the third quarter of 2008.

4. Other activities

37. An enterprise-wide system architecture that aligns business and technology is being developed by drawing together the documentation of strategic frameworks, programme planning, organizational diagrams, the accountability framework, data models and supporting technology. The system architecture describes the context of work programmes and operations, responsible organizations, system design, technology infrastructure and possible solutions. Efforts during the preparatory phase are focusing on the strategic, programme and organizational context, which facilitates the re-engineering of high-level business processes.

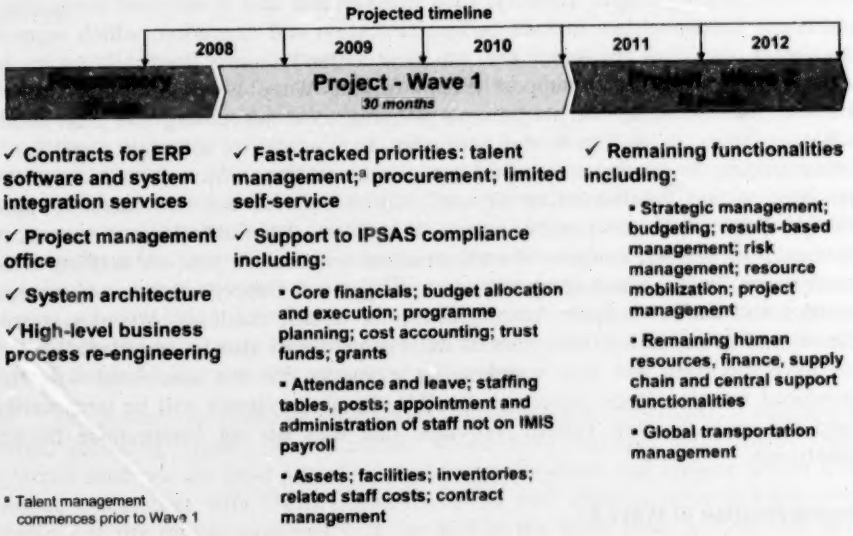
38. The Secretariat is streamlining and harmonizing its organizational, managerial and administrative arrangements as a prerequisite for the ERP implementation. Towards this end, senior management is committed to specific improvements early in the project ensuring that the ERP system is successful in assisting the implementation of change. Work has commenced to review critically the current policies, procedures and associated arrangements with the goal of identifying key areas where changes are required. Key approaches for implementing international best practices are being identified so that work on high-level business process re-engineering can proceed expeditiously. The examination should result in agreement on a framework to guide the detailed ERP process design and configuration work to commence after ERP software selection. An associated activity is to establish key baseline indicators in all business areas. Overall progress against the baseline will be included in annual reports.

39. In addition, a data migration planning exercise will be conducted in the summer of 2008 to ensure that all existing data sources, particularly those outside IMIS and ancillary systems, are analysed. The planning will include the detailed arrangements necessary for all data to be properly prepared in terms of completeness and accuracy for migration to the ERP system. Applying lessons learned from the development and implementation of IMIS, activity planning will include meeting the more stringent requirements imposed by the new ERP system on the quality of data. The proper cleaning, testing and conversion of data will be closely monitored and, for each case, will be a prerequisite for deciding to commence operations with the new system.

E. Implementation plan

40. Once the preparatory phase is completed, the implementation plan calls for implementation in two waves, as shown in the timetable below at figure II. Wave 1 would commence in the third quarter of 2008 following the completion of preparatory activities. It will focus on key management priorities and is expected to take 30 months. Based on the current project progress, Wave 1 would be substantially completed by the end of 2010. Specific timings and technical arrangements for acceptance testing and data conversions will be determined by the integration services once they are engaged. Wave 2 will focus on the implementation of remaining functionalities of the ERP software solution and is expected to take 24 months. The current implementation plan foresees the first quarter of 2011 as the earliest start date for Wave 2, with a target for substantial completion by the end of 2012. Every effort will be made to complete the project within the projected time frames. Each wave will be succeeded by a short evaluation. Annual progress reports will be submitted to the General Assembly, including inter alia, details of overall progress against the baseline.

Figure II
Timetable


Projected timeline
2008
2009
2010
2011
2012
Project - Wave 1
30 months
✓ Contracts for ERP software and system integration services
✓ Project management office
✓ System architecture
✓ High-level business process re-engineering
✓ Fast-tracked priorities: talent management;[a] procurement; limited self-service
✓ Support to IPSAS compliance including:
• Core financials; budget allocation and execution; programme planning; cost accounting; trust funds; grants
• Attendance and leave; staffing tables, posts; appointment and administration of staff not on IMIS payroll
• Assets; facilities; inventories; related staff costs; contract management
✓ Remaining functionalities including:
• Strategic management; budgeting; results-based management; risk management; resource mobilization; project management
• Remaining human resources, finance, supply chain and central support functionalities
• Global transportation management
[a] Talent management commences prior to Wave 1

41. The functionalities assigned to each wave will be designed and built based on configuring the ERP software solution to meet the requirements of the Secretariat. Design and build activities will be supported by associated detailed business process re-engineering, legacy data preparation, data cleansing and change management. Those activities will be undertaken by subject matter experts from Headquarters, offices away from Headquarters, regional commissions and field missions and closely coordinated by the ERP project team. Configuration will include meeting IPSAS process and data requirements that will be guided by an approach for making IPSAS policies operational. Alignment with requirements will be limited strictly

within minimal levels of customization. On completion of design and build, ERP functionalities will be deployed globally to all relevant Secretariat locations. The deployment will be supported by data migration, software training and technology hosting activities undertaken in coordination with, and with the support of, user organizations and specialist areas.

1. Implementation of Wave 1

42. The implementation of Wave 1 will entail establishing a dedicated project team with the capacity to arrange coordinated contributions by stakeholder subject matter experts and engage fully with system integration services.

43. Priorities given to recruitment and mobility are currently being met in a separate project for a talent management system, which is expected to be implemented by the end of 2008. Linkages for resource transactions will be established between the talent management system and the ERP system. Other priorities for early implementation will be procurement and limited self-service capabilities involving staff records. Based on the current plan, the first of these fast-tracked capabilities are expected to be completed by the third quarter of 2009.

44. Wave 1 also replaces IMIS, Sun and other ancillary legacy functionalities with IPSAS compliant core financials, which includes accounts payable, accounts receivable, general ledger, treasury, cash management and investment accounting. Additional functionalities include budget allocation and execution, which support monitoring the flow of monetary transactions and funds from allotments to disbursements. In order to support IPSAS further, Wave 1 will introduce limited financial functionalities for programme planning, cost accounting and trust funds including grants, as well as human resources functionality of attendance and leave administration. In the human resources management area, Wave 1 will cover the appointment and administration of staff whose salaries are not currently paid through IMIS, such as locally recruited staff in the field. Human resources functionalities for that category of staff members will include post and staffing table management, benefits and compensation management. Supply chain, procurement, logistics and central support functionalities for assets, facilities, inventories and related staff costs, as well as contracts management will also be included. Wave 1 will have reporting and data warehousing elements that are associated with the introduced functionalities. Wherever feasible, existing systems will be temporarily interfaced with the new system, provided that they do not compromise IPSAS compliance.

2. Implementation of Wave 2

45. Wave 2 will introduce and integrate strategic management functions such as budgeting, results-based management, risk management, resource mobilization, programme management and project management. Those functionalities will aim to strengthen financial planning and programme management. Wave 2 will also cover the remaining supply chain and central support functionalities, including global transportation management and travel management. Once the human resources functionalities are completed, the system would cover staff administration and payroll for those staff already currently administered through IMIS. The completion of data warehousing will enable the introduction of multilevel management reporting, executive dashboards and data interchange for Member States and donors.

3. Technology infrastructure preparations

46. Successful implementation of key ERP project milestones is dependent on the timely completion of the proposed preparatory work on the technology side. Achieving the management priorities of the ERP project relies on the synchronized implementation of technology infrastructure for disaster recovery and business continuity as proposed in the report of the Secretary-General (A/62/477). The technology infrastructure necessary to support hosting the fully operational ERP system will critically rely on the data centre site at the United Nations Logistics Base at Brindisi, Italy, and a secondary site in Valencia, Spain as proposed in the disaster recovery and business continuity project detailed in the aforementioned report. Accordingly, both the present report and the report on business continuity are considered integrally linked.

4. Transition from legacy systems

47. The transition from IMIS and other legacy systems requires development of a large number of system interfaces and data repositories during ERP implementation until all functionalities are put into operation in the new system. The level of support for IMIS and other systems will be generally the same. However, it will require increased levels of effort from all technology areas during the transition period for building interfaces, data migration and reconciliation of multiple data sources.

48. The transition will commence with the data migration for functionalities in Wave 1. Transition will continue for specific functionalities until after the completion of Wave 2. An example of the size and complexity of data migration is the human resources system of records, which is supported by IMIS in eight locations, a number of complementary legacy systems and paper files for each staff member. The separate IMIS and other legacy systems are not sufficiently integrated to provide highly reliable validation of key data. The majority of transactional data is currently taken from copies of original documents, such as certificates, passports, and the like, and is re-entered into IMIS and other systems on each occasion that it is required. Transition therefore involves comprehensive efforts in extracting paper-based data and accurately entering such information into the ERP system, ensuring that all fields for key data are accurately populated.

49. The human resources functionalities utilize a range of systems in addition to IMIS, including Galaxy and Nucleus, which have linkages with IMIS. Other systems used are the field personnel management system and Progen, which have limited integration with IMIS. However, these two systems have linkages with Nucleus in the former case and with the Sun in the latter case. As concerns most finance functionalities, in addition to a direct linkage with IMIS, there is also a separate direct linkage with the Sun system. The transition during Wave 2 involves additional systems currently linked with IMIS, such as the budget information system and the electronic personnel appraisal system as well as the need to transition from other separate systems such as Procure Plus, Mercury and Galileo for procurement and asset management.

F. Operation and resource requirements

50. All enterprise systems, including the ERP system, will operate from two data centres situated in the United Nations Logistics Base at Brindisi, Italy, and at a proposed secondary site in Valencia, Spain. Those sites, which would be at the core of the disaster recovery and business continuity plan for the Secretariat, would host the two hubs for telecommunications and computer operations for all offices of the Secretariat. Requirements relating to the disaster recovery/business continuity plan contained in the report of the Secretary-General (A/62/477) and the related report of the Advisory Committee on Administrative and Budgetary Questions (A/62/7/Add.31) are presently before the General Assembly. Accordingly, the requirements for hardware and infrastructure costs have not been repeated in the present report.

51. However, it should be noted that the resources requested for the disaster recovery and business continuity plan will cover telecommunications, computer and data-storage equipment and human resources earmarked for the operation of the disaster recovery and business continuity facilities. Until the new ERP system is fully implemented, those facilities will provide business continuity capabilities for critical systems such as IMIS, currently operating in all offices and peacekeeping missions. Upon full implementation of the ERP system, the same facilities will serve as the operational platform for the new system.

52. The full deployment of an ERP system in an organization of the size and complexity of the global United Nations Secretariat will require significant resources over the course of its implementation, which is expected to take approximately five years. Once implemented, recurring expenditures would relate to the upgrade, maintenance, and operation of the system. However, it is important to note that the adoption of a commercial solution in addition to the system's centralized operation will substantially reduce recurrent costs provided that customization is kept to a minimum. It is expected that the useful life of the ERP system will be 15 to 20 years.

Total project costs estimates

53. The project costs estimates cover the implementation and deployment of the ERP system.

54. At this stage pending the conclusion of procurement activities, the cost of implementation and deployment of the ERP system does not benefit from details on firm contract costs for software and system integration services (see below). Nevertheless, on the basis of current market pricing, the ERP project costs of other United Nations organizations and advice sought from industry sources, it is estimated that a total of $285.6 million (at current rates), including a contingency provision (15 per cent of project) amounting to $37.3 million will be required for the implementation of an ERP system in the Secretariat over a five-year period. These requirements are summarized in table 1 below and the overall explanation of each of the components which comprises the total project costs follows below. It should be noted that no provision has been made at this stage for potential post-implementation (maintenance and other support costs) requirements for the new ERP system. Due consideration will be given as the project develops and will be reported accordingly to the General Assembly in the subsequent annual reports.

Table 1
Summary of net resource requirements, by activity (total project budget at current rates)
(Thousands of United States dollars)

Component	*Total*
Software licences and customization	30 000.0
Integration costs	128 699.8
Project and change management	47 873.0
Training	37 022.0
Operational costs	4 718.8
Subtotal	**248 313.6**
Contingency provision	37 247.0
Total	**285 560.6**

(a) Software licences and customization

55. ERP software vendors can offer a wide range of solutions and pricing configurations. Pricing depends on the number and type of licences, interfaces, portals and tools for data warehousing and reporting. It is assumed for budgetary purposes that the Organization would successfully negotiate a favourable agreement for enterprise licences. The total estimated cost for software licences is $15 million. Based on guidance from industry advisors and experience of other United Nations organizations, the cost for unavoidable software customization to be undertaken by the software vendor is projected at the same level as the licence cost ($15 million). Accordingly, it is estimated that the software licences and customization component of the project would amount to $30 million.

(b) Integration costs

56. Integration costs cover wide-ranging activities for designing, building and rolling out the ERP solution in all functional areas:

(a) Design includes linkages with business processes re-engineering and organizational change;

(b) Building involves configuring ERP solutions to meet specific user requirements;

(c) Roll-out entails legacy data migration and testing solutions on the technology infrastructure.

57. Based on specialized advice and lessons learned from the development and implementation of IMIS, integration presents some of the largest cost elements of a new ERP system. Consequently, the integration services required for the Secretariat, including offices away from Headquarters, regional commissions and field missions are estimated at $128.7 million.

(c) Project and change management

58. The ERP project team would be responsible for identification of requirements, process re-engineering, software configuration and implementation of the various releases. A project team consisting of 44 temporary posts (1 D-2, 6 D-1, 12 P-5, 13 P-4, 5 P-3, 7 General Service (Other level)) as reflected in figure III below would be required for the duration of the implementation of the ERP system. The project team would carry out the following functions:

(a) Identification of requirements suitable for software selection;

(b) ERP software evaluation and selection;

(c) Business process standardization, streamlining and re-engineering and adoption of best practices;

(d) Change management and communications;

(e) Software configuration and software customization, as a last resort;

(f) Development of temporary and permanent interfaces;

(g) Evaluation and coordination of ICT infrastructure requirements to enable efficient data interchange;

(h) Data cleansing, conversion and reference table preparation;

(i) Report specification, design and development;

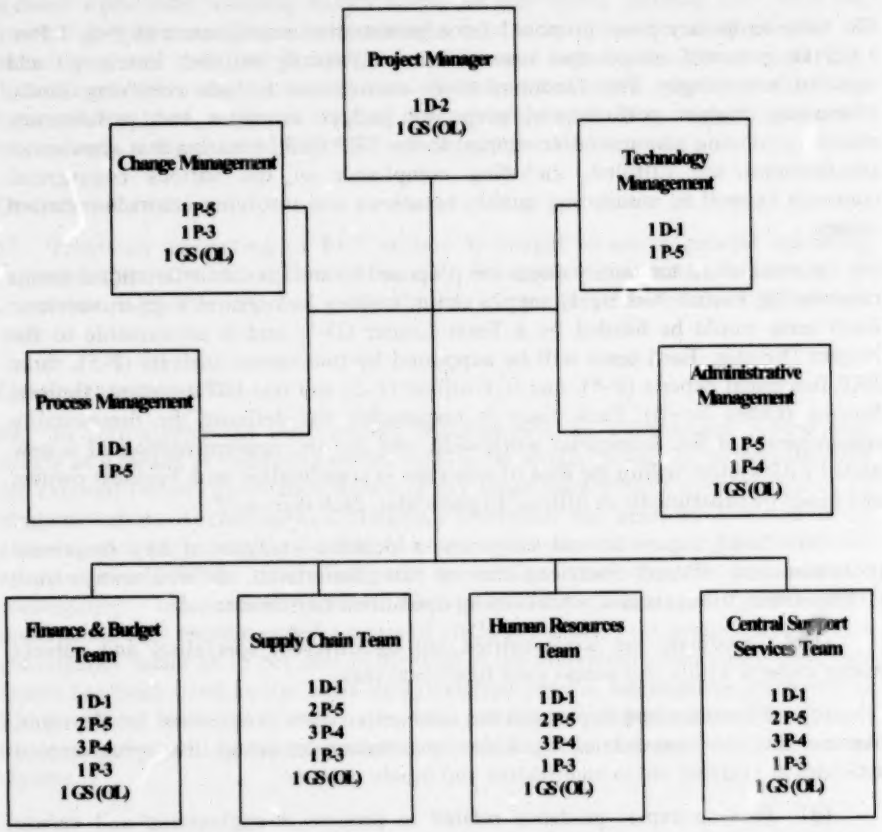
(j) User training in all locations;

(k) Procurement and acquisition support for system integration and software;

(l) Project planning, management and administrative support, including management of consultancy contracts.

59. The Project Director, at the D-2 level, would be responsible for the overall management of the project, including change management, process management, technology architecture and project administration, and for supervising the work carried out by the four functional teams in the areas of human resources, supply chain, finance and budget, and central support services. The Project Director would be assisted by a Project Assistant (General Service (Other level)) who will provide project and administrative support to the project management team.

Figure III
Organizational structure and proposed post distribution



60. The temporary posts proposed for change management (1 P-5, 1 P-3, 1 GS (OL)) would focus on assessing the impact of the ERP system on staff and management, designing and implementing a strategy for support activities in areas such as communication, organizational development, and training to promote a smooth transition. A communications programme would be aimed at making all staff aware of ERP, its goals and objectives, impact on work, and keeping the user community at large up-to-date, including through the development and maintenance of a website.

61. Two temporary posts are proposed for process management (1 D-1, 1 P-5). The Process Management Coordinator (D-1) will lead business process improvement initiatives that will be required in the implementation of ERP and will be responsible for the overall quality assurance for the project. He/she will be supported by a Senior Project Officer (Risk Management). The process management staff will plan the scope and timing of the milestone reviews and manage them.

62. The temporary posts proposed for technology management (1 D-1, 1 P-5) would deal with activities encompassing the definition of the enterprise-wide ICT architecture, setting technical standards, projecting enterprise-wide ERP needs,

evaluating the suitability of infrastructure operations and identifying gaps between existing infrastructure and ERP requirements, and provide expertise and guidance during the implementation phase.

63. The temporary posts proposed for administrative management (1 P-5, 1 P-4, 1 GS (OL)) would ensure that resources are efficiently utilized, monitored and reported accordingly. The functions to be carried out include certifying funds, monitoring budget performance, preparing budget estimates and performance reports, providing administrative support to the ERP team, ensuring that contractual arrangements are fulfilled, including compliance of the various commercial contracts as well as monitoring quality assurance and resolving contract variation issues.

64. A total of 32 temporary posts are proposed to staff the four functional teams representing human resources, supply chain, finance and central support services. Each team would be headed by a Team Leader (D-1) and is accountable to the Project Director. Each team will be supported by two senior analysts (P-5), three ERP functional experts (P-4), one ICT officer (P-3) and one ICT assistant (General Service (Other level)). Each team is responsible for defining the functionality requirements of the Secretariat worldwide, and for the implementation of a new global ERP system within the area of expertise in coordination with business owners and heads of departments or offices. In particular, each team will:

(a) Lead, supervise and carry out a detailed analysis of key functional processes and related functionalities at the Secretariat, offices away from Headquarters, tribunals and peacekeeping operations worldwide;

(b) Coordinate the work carried out by different specialists and subject matter experts within and across each functional team;

(c) Formulate and implement the substantive work programme for the team; oversee the management of activities undertaken, ensuring that programmed activities are carried out in an effective and timely manner;

(d) Provide expert guidance related to process re-engineering and ensure validation of outcomes by all stakeholders;

(e) Collaborate with the technology team in the determination of the functional fit of competing ERP software and the evaluation of interoperability with existing software;

(f) Contribute to the development and implementation of a change management plan and the development of relevant user training modules and manuals.

65. Change management is a critical element of a successful ERP implementation. A structured change approach improves the chances of project success by ensuring "buy-in" on the part of all stakeholders at every stage of the process. This "buy-in" can be achieved through use of a communication strategy, creating project champions, improving transparency, identification of and addressing major obstacles to implementation such as staff resistance and development of an effective means to ensure sustainable behavioural changes. Process improvement, communication and other approaches for effecting change are essential, enabling broad input and participation which ensures ownership of decisions by programme managers and other relevant staff.

(d) Training

66. It is expected that over 10,000 staff members will require training at duty stations worldwide. Training modes would include online learning and "train the trainer" programmes. The latter training programme serves the dual purpose of reducing overall costs and building critical internal capacity at duty stations. Key determinants of overall training costs include the current employee skill set, responsibility level, modes of training delivery and timing of training programmes. Accordingly, a provision of $37 million is sought for that purpose.

(e) Operational costs

67. Provision amounting to $4.7 million is sought to cover general operating expenses, furniture and equipment as well as supplies and materials required in connection with the proposed establishment of the 44 posts for the ERP project team.

(f) Contingency provision

68. In formulating the total project requirements, an independent review was sought as a means of validating the amounts to be sought. However, notwithstanding the external review, uncertainty arises in any large-scale project over the life of its implementation. Accordingly, contingency provision has been an accepted fiscal planning tool for managing the risk of cost escalations and covering potential cost estimate shortfalls. In determining the percentage amount to be proposed for contingency, independent advice based on experiences of global ERP implementations recommended a range of 10-25 per cent. In the present proposals, a contingency factor of 15 per cent of the total of the individual components described above has been used as the basis of calculation for the contingency provision of $37.3 million. Recourse to the contingency provision during the life of the project implementation will be reported accordingly to the General Assembly in the annual reports.

G. Risk management

69. A preliminary analysis on risks presented here provides a starting point for more detailed and structured examination, including the use of risk assessment services, which will be engaged through a competitive procurement process.

1. Operational risk

70. One of the key objectives of the ERP project is to implement best practice processes. During process changes that affect planning and resource allocation, critical support to current operations will be at risk. The Secretariat's goal for ERP is to build an integrated global system, which includes all financial, human and physical resource processes at Secretariat locations globally. Operational entities will need to redirect efforts to ERP implementation to support business processes re-engineering, design of the new system, preparation of legacy data, and rolling out the new application. The impact of failing to provide critical support to operations adversely affects the achievement of mandates.

71. Given competing priorities, business owners will need to plan well in advance and carefully assign resources to ensure that operational and ERP tasks are accomplished. Backstopping specific operational needs during implementation will mitigate the identified risk.

2. Financial risk

72. The decision to replace IMIS with the ERP system could place financial integrity at risk during transition. Replacement will be complicated owing to eight separate IMIS installations, each with interconnections with other legacy systems and significant data not held in IMIS. The number of connections and proportion of data are high and accordingly the impact of financial risk is high. In the case of failure, a range of alternatives would be activated incurring time and cost penalties, which heighten the sensitivity of financial risk.

73. Financial risk will be mitigated by taking a systematic approach in making IPSAS policies operational through tripartite efforts by the IPSAS project, business areas and the ERP project. Additional mitigation measures involve development of legacy transitional arrangements. Where specific functionalities cannot be fully deployed in time, interim arrangements will be made for IPSAS compliance within existing systems. That effort will be complemented by support from technology owners in facilitating data migration and any necessary temporary interfaces with legacy systems.

3. Reputation risk

74. The Organization's reputation will be enhanced by achieving IPSAS compliance competently and without qualification. The provisions of section IV, paragraph 2, of General Assembly resolution 60/283 are being applied and IPSAS implementation timings are realistically synchronized with the introduction of the ERP system. Contingent on having the IPSAS required modules of ERP in place by the end of 2010, future financial statements shall be based on progressive incorporation of IPSAS standards, starting with those for the period ending 31 December 2011. However, if the funding proposal for the ERP project is not approved by the General Assembly at its resumed sixty-second session, it will not be possible for the Secretariat to deploy IPSAS-compliant functionalities by the end of 2010, resulting in the Secretariat failing to meet the expectations of Member States and the public. A communication plan for engaging external stakeholders will be developed for IPSAS implementation in conjunction with other key reform initiatives, including enterprise resource management.

4. Time and budget risks

75. Completing the project on time and within budget is put at risk by the usual procedures for cross-organizational consultations and decision-making. The likelihood of time and budget risks is high and is demonstrated by reviewed performance of other project activities by the Secretariat. Similarly demonstrated are the high impact and sensitivity of time and budget overruns.

76. Mitigation of time and budget risks will be by exceptional handling of ERP issues in cross-organizational consultations and decision-making. Concurrent activities will be boxed into a period of time defined by key milestones and capped by a total cost, which shall not be exceeded during the time box. All internal

stakeholders will be unified in committing to the time-boxing milestones set separately in the implementation plan. It is expected that strong commitment will also be demonstrated in prompt decision-making and responsiveness in supporting project activities.

5. Technical quality risks

77. The capacities of internal expertise do not cover all specific competencies of ERP implementation and risk technical quality. Technical quality affects the upgrade effort and longer-term utility of the new system and therefore has a high impact. The wide range of technical aspects and complexity of interdependencies result in a high likelihood of risk. Technical failure would cause the project to fall short of replacing legacy systems with a next-generation system and therefore sensitivity is high. Technical quality risks will be mitigated by selecting competent external system integrators with extensive ERP implementation experience and, on an as-needed basis, using independent third-party expertise for evaluating and validating key technical decisions throughout the project period.

6. Commercial performance risks

78. Current procurement procedures and contractual arrangements place at risk the commercial performance required of ERP implementation partners. The duration and global reach of implementation heighten the likelihood and impact of commercial performance risk. High sensitivity of that risk is a direct consequence of heavy reliance on commercial services, particularly for systems integration. Mitigating commercial performance risk will include undertaking thorough due diligence efforts during the request-for-proposals process and engaging legal advice to determine contractual arrangements that assign the risk burden in the best interests of the Organization.

H. Financing arrangements

79. The main value of the enterprise resource planning system will be that it provides an opportunity to streamline and improve the operations of the entire Organization through process-re-engineering, sharing of common data and implementation of best practices and standards. As the ERP system encompasses all administrative activities of the Organization, namely finance and budget management, human resources management, supply chain management, central support services, and other core services, due consideration has been given to the appropriate channels of funding for the project, as its financing should not be solely restricted to the regular budget. In this connection, it is proposed that the ERP be financed from among the main sources of funds, namely the regular budget, peacekeeping and extrabudgetary resources in the following percentages: 15 per cent from the regular budget; 62 per cent from the peacekeeping support account; and 23 per cent from the special accounts for programme support costs to which are credited overhead income generated by expenditures relating to technical cooperation, and to general trust funds as well as reimbursement for administrative support provided by the Organization to extrabudgetary entities such as the United Nations Development Programme and the United Nations Children's Fund, and so forth. That formula is based on the distribution of 2008-2009 estimated resources between the regular budget, peacekeeping activities and technical cooperation and

general trust funds and administrative support provided by the Organization to extrabudgetary entities, proportioned against the total ERP project cost.

80. Under that arrangement, the overall estimated cost of the ERP project ($285,560,600 at current rates), inclusive of the contingency provision of $37,247,000 would be distributed as indicated in table 2 below. The contingency provision shared between the three sources of funding would amount to $5,587,000 under the regular budget, $23,093,200 under the peacekeeping support account and $8,566,800 under the extrabudgetary resources. It is proposed that the contingency provision be financed immediately in 2008-2009.

Table 2
Summary of net resource requirements by source of funds
(Full project cost at current rates)
(Thousands of United States dollars)

Source of funds	*2008-2009*[a]	*To end of project 2012*	*Total*
Regular budget	12 348.6	24 898.4	37 247.0
Peacekeeping support account	51 041.0	102 913.4	153 954.4
Extrabudgetary	18 934.7	38 177.5	57 112.2
Total	**82 324.3**	**165 989.3**	**248 313.6**
Contingency provision	37 247.0	—	37 247.0
Total	**119 571.3**	—	**285 560.6**

[a] For 2008-2009, amount relates to the peacekeeping period 1 July 2008 to 30 June 2009 and first six months of the subsequent period.

81. Of the total estimated amount for the project for the biennium 2008-2009 of $82,324,300 (at current rates), it is proposed that: (a) an amount of $12,348,600 be funded under the regular budget, (b) the amount of $51,041,000 from the peacekeeping support account, consisting of $37,355,300 for the period 1 July 2008 to 30 June 2009 and an amount of $13,685,700 from the subsequent peacekeeping support account budget for the period 1 July 2009 to 31 December 2009. At the same time, in line with the cost-sharing arrangements, an amount of $18,934,700 would be provided from extrabudgetary resources.

82. With respect to the financing of the requirements under the regular budget for the biennium 2008-2009, approval is sought to:

(a) Utilize the accrued interest income under the IMIS Fund previously established for the IMIS project. The current balance at 31 December 2007 amounts to $2.346 million. It will be recalled that in its resolution 56/271, the General Assembly had authorized the use of accrued interest income to meet requirements of IMIS relating to the activities detailed in the report of the Secretary-General (A/56/602);

(b) Use of the available balances in the surplus account of the United Nations General Fund. As at 31 December 2007, the available balance amounts to $141.1 million. Accordingly, it is proposed that the balance required for the ERP project for the biennium 2008-2009, after consideration of paragraph 82 (a) above

amounting to $15.6 million, be funded through the surplus account. This would require a suspension of the provisions for the application of credits under regulations 3.2 (*d*), 5.3 and 5.4 of the Financial Regulations and Rules of the United Nations, which would otherwise have to be surrendered pursuant to those provisions.

83. In view of the lifespan of project implementation over a five-year period, it is proposed that a multi-year special account be established to record income and expenditures for the ERP project. It will be recalled that similar arrangements had been authorized in connection with the financial management of the previous IMIS project as well as various construction and/or major improvement projects. Funds provided for the ERP project and resultant expenditures therefore will be recorded in a separate ERP Fund and any unexpended balances will be carried forward into succeeding bienniums until the project is completed. Interest earned on the ERP Fund will be credited to that Fund.

IV. Complementary systems: what an enterprise resource planning system will not cover

84. The present section of the report resubmits proposals that had earlier been submitted in the report of the General Assembly (A/62/510). The raison d'être of the projects remains unchanged and hence has effectively been repeated. The financial requirements have, however, been updated to reflect current rates as well as a modified funding period.

85. The ERP system will provide the Organization with the required tools to effectively plan, allocate, monitor and report the flow of resources globally. It will also add efficiency through the streamlining, standardization and automation of administrative processes.

86. However, an ERP system, in and of itself, will not address all inefficiencies. Nor will it ensure the quality of the "products" developed and delivered by the United Nations Secretariat. Of particular relevance to the Secretariat are two areas which absorb significant resources: (a) the delivery of services and (b) the creation, preservation, dissemination, archival and disposal of documents and other information in a variety of media.

A. Managing services: customer relationship management

87. While the ERP system will streamline and automate the core financial, administrative and management operations, the CRM system will deal with the specific processes connected with providing day-to-day services for end-users, which are not usually dealt with by an ERP system.

88. The primary objective of a CRM system is to improve the quality and cost-effectiveness of services provided to end-users, which includes a wide range of customers and constituents.

89. While ERP focuses on the flow of resources throughout the Organization at the macro level, CRM addresses the detailed processes involved in the provision of

specific services for specific end-users. The following are examples of how these two systems relate with each other:

(a) While the acquisition of computers or furniture will be dealt with in an ERP system, the assignment of such assets to specific individuals will be handled by the CRM system;

(b) While the overall inventory and the costs of maintaining equipment in working condition will be managed by the ERP system, the detailed process of maintaining a specific item, such as identifying the need for a repair, executing the repair, and tracking the assignment of the item to an individual technician, will be handled by the CRM system;

(c) While human resources will be managed at a higher level by the ERP system, the workforce management for service-related activities will be managed at a micro level within the CRM system.

90. The CRM system will be very important in large offices, where the high number of users and the variety and complexity of services provided demand efficient methods to optimize the use of available resources. In the field, however, the provision of services to civilian and military personnel acquires a critical dimension, as the field mission is likely to be the sole provider of basic and often vital day-to-day services.

91. Resources required for the implementation of CRM relate to three specific priority areas. These cover facilities and Member States services management, peacekeeping troop contribution management, and peacekeeping telecommunications billing. Given the nature of these three areas, it is proposed that the costs related to facilities and Member States services management would be borne by the regular budget, while the costs related to the other two areas would be borne by the peacekeeping support account. The costs associated with these three areas are summarized in table 3 below. Further information on the implementation of the CRM system in these areas is detailed in annex I to the present report.

Table 3
Resource requirements for CRM implementation, by priority area
(Thousands of United States dollars)

Regular budget[a]	
Facilities and Member States services management	1 510.9
Subtotal	**1 510.9**
Peacekeeping operations support account	
Peacekeeping troop contributions management	3 626.9
Peacekeeping telecommunications billing	3 083.2
Subtotal	**6 710.1**
Total	**8 221.0**

[a] At current rates.

92. The total resource requirements for the implementation of CRM amounting to $8,221,000 (at current rates) are detailed in table 4 below:

Table 4
Total resource requirements for CRM implementation
(Thousands of United States dollars)

	Regular budget[a]	*Peacekeeping support account*			
Object of expenditure	*2008-2009 estimate*	*1 July 2008 to 30 June 2009*	*1 July 2009 to 30 June 2010*	*Total peacekeeping support account*	*Grand total*
Other staff costs	491.4	746.0	746.2	1 492.2	1 983.6
Consultants and experts	747.3	297.5	107.5	405.0	1 152.3
Travel of staff	32.6	272.0	136.0	408.0	440.6
Contractual services	69.7	153.6	76.8	230.4	300.1
General operating expenses	53.4	597.0	596.9	1 193.9	1 247.3
Furniture and equipment	116.5	2 980.6	—	2 980.6	3 097.1
Total	**1 510.9**	**5 046.7**	**1 663.4**	**6 710.1**	**8 221.0**

[a] At current rates.

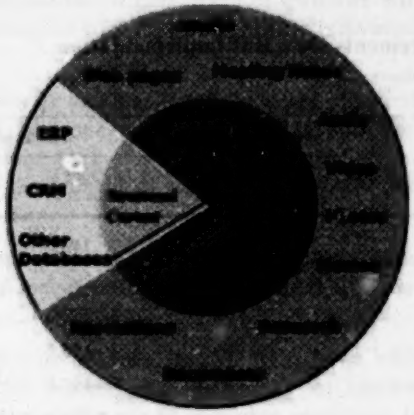
93. Of the total estimated amount required for the CRM project ($8,221,000), it is proposed that the amount of $1,510,900 under section 28A, Office of the Under-Secretary-General for Management, of the programme budget for the biennium 2008-2009, be funded through the balance in the surplus account of the United Nations General Fund. This would require a suspension to the provisions of regulations 3.2 (*d*), 5.3 and 5.4 of the Financial Regulations and Rules of the United Nations. In addition, it is proposed that the remaining amount of $6,710,100 be funded from the peacekeeping support account distributed as follows: (a) an amount of $5,046,700 under the peacekeeping operations support account for the period 1 July 2008 to 30 June 2009, and (b) an amount of $1,663,400 to be funded under the subsequent peacekeeping support account budget proposals for the period 1 July 2009 to 30 June 2010.

B. Managing knowledge: enterprise content management system

94. The ECM system can be seen as the counterpart of ERP for the substantive areas of the Organization. While ERP deals with resources (people and financial assets), ECM addresses information assets of a substantive nature.

95. In common with most organizations, the Secretariat has much more "unstructured" information than "structured" information. Figure IV provides a summary of what typically constitutes unstructured information and its importance and volume within an organization such as the Secretariat:

Figure IV
Summary of structured and unstructured content



96. In a knowledge-intensive organization where information is a key enterprise asset and enabler, ECM is recognized as a core competency and capability. Loss of information or inability to access it can be crippling for most organizations. An ECM system addresses these fundamental requirements in many ways:

(a) The ECM system brings structure to unstructured content, by requiring the entry of certain data-attributes called "metadata" for every document or other form of content that is created and stored;

(b) By establishing clear ownership of content and audit trails of access and reuse of content, the ECM system can provide unmatched security for information assets and enable the Secretariat to reliably provide access to information, internally and externally, to increase the transparency of its operations. Member States, Permanent Missions, partners, telecommuters, and so on, can be provided secure access to relevant information from any location;

(c) The ECM system will provide an efficient records management system that meets mandated standards for archiving and disposing enterprise content;

(d) Optimizing the management of content through version control and reuse of existing content, will make the content volume more manageable and help the Secretariat to contain the storage growth rate which is outstripping industry averages, resulting in high costs for storage infrastructure and recurring costs for storage and backup;

(e) The ECM system also facilitates knowledge-sharing within the Secretariat and with other international organizations, non-governmental organizations and the public at large through its capabilities for the creation and dissemination of content on internal and external websites;

(f) By providing a simple, browser-based capacity to create content, it empowers staff with minimal ICT skills to create and manage dynamic content of both internal and external websites;

(g) By standardizing web content authoring, the ECM system can easily enforce Secretariat standards for visual content, such as user interfaces, accessibility requirements, and facilitate the branding of internal and external websites;

(h) The ECM system can rigorously enforce security and control over the release of information to websites, especially external websites. For example, the release of content simultaneously in all the official languages could be automatically enforced;

(i) The ECM system will enable website administrators to manage multiple global sites (United Nations Headquarters, offices away from Headquarters, etc.).

97. The examples listed above clearly indicate the benefits of an ECM solution as an effective knowledge-sharing facility. In the field, an ECM system constitutes an indispensable complement to ERP. Peacekeeping and political missions conduct business with local entities largely based on paper transactions. The ability to digitize, classify, store and electronically link these documents to ERP ensures the integrity of financial transactions. In that connection, several reports of the Office of Internal Oversight Services have highlighted the poor mechanisms which exist today to ensure proper asset and financial controls in the field.

98. Resources required for the implementation of the ECM relate to priority areas covering the Official Documents System (ODS), the United Nations Internet site, collaboration capabilities, the peacekeeping reporting process automation and guidance content repository as well as overall ECM governance. Given the nature of these areas, it is proposed that the costs related to ODS and the United Nations Internet site would be borne by the regular budget, while the costs related to the peacekeeping reporting process automation and guidance content repository would be borne by the peacekeeping support account. The costs related to the other areas (ECM governance and collaboration capabilities) would be equally shared between the regular budget and peacekeeping support account. The costs associated with the above-mentioned areas are summarized in table 5 below. Further information on the implementation of the ECM system in those areas is detailed in annex II to the present report.

Table 5
Resource requirements for ECM implementation, by priority area
(Thousands of United States dollars)

Regular budget[a]	
ECM Governance	234.9
United Nations Internet site	2 983.0
ODS	670.4
Collaboration capabilities	315.3
Subtotal	**4 203.6**
Peacekeeping operations support account	
ECM Governance	240.0
Collaboration capabilities	322.1
Peacekeeping Reporting Process Automation	6 009.5

Peacekeeping Guidance Content Repository	4 216.9
Subtotal	**10 788.5**
Total	**14 992.1**

[a] At current rates.

99. Total resource requirements for the implementation of the ECM would amount to $14,992,100 and are detailed in table 6 below:

Table 6
Total resource requirements for ECM implementation
(Thousands of United States dollars)

	Regular budget[a]	*Peacekeeping support account*			
Object of expenditure	*2008-2009 estimate*	*1 July 2008 to 30 June 2009*	*1 July 2009 to 30 June 2010*	*Total peacekeeping support account*	*Grand total*
Other staff costs	899.3	1 553.6	1 065.1	2 618.7	3 518.0
Consultants and experts	1 272.3	441.2	102.6	543.8	1 816.1
Travel of staff	—	240.0	120.0	360.0	360.0
Contractual services	269.4	222.8	67.2	290.0	559.4
General operating expenses	596.4	995.0	995.0	1 990.0	2 586.4
Furniture and equipment	1 166.2	4 986.0	—	4 986.0	6 152.2
Total	**4 203.6**	**8 438.6**	**2 349.9**	**10 788.5**	**14 992.1**

[a] At current rates.

100. Of the total estimated amount required for the ECM project of $14,992,100, it is proposed that the General Assembly approve under section 28A, Office of the Under-Secretary-General for Management, of the programme budget for the biennium 2008-2009, an amount of $4,203,600 to be funded from the surplus account of the United Nations General Fund. This would require a suspension of regulations 3.2 (*d*), 5.3 and 5.4 of the Financial Regulations and Rules of the United Nations. In addition it is proposed that the balance of the project costs amounting to $10,788,500 be funded under the peacekeeping operations support account budget for the period 1 July 2008 to 30 June 2009 ($8,438,600) and the subsequent peacekeeping support account budget for the period 1 July 2009 to 30 June 2010 ($2,349,900).

V. Conclusion

101. The present report sets forth the Secretary-General's vision of the role that ICT can play in transforming the way the Secretariat works. In accordance with that vision, there is a need to simplify and streamline rules, policies, and processes so that the Secretariat is not totally mired in process, but becomes proactive, responsive and results-oriented. The enterprise systems proposed — ERP, CRM, and ECM system — in the present report will make that vision achievable, and have the

potential of serving as the engine for supporting management reform and modernizing the Organization.

102. Strategic ICT capabilities of the Secretariat lag behind other organizations owing to systemic under-investments for Organization-wide purposes. As a result, the Secretariat has not been able to fully leverage ICT in a manner that enables the entire Organization to benefit from its potential. The recent Secretariat-wide ICT strategic planning has revealed acute needs for improving the management of institutional knowledge and resources in the context of global operations of the Secretariat. These three enterprise systems are critical and integral parts of the new comprehensive ICT strategy for the Secretariat.

103. However, it is not only a matter of simplifying processes. Current systems are at the breaking point, and woefully inadequate for carrying out the increasingly complex, far-reaching operations of the Organization. It is urgent that the Secretariat proceed with building core modern information management systems that can sustain the vastly increased operations the United Nations is undertaking across the globe.

104. While the resources required are considerable, but so are the long-term benefits to the Secretariat. What is clear is the overwhelming need to embark on these projects without delay, in order to better equip the Secretariat to successfully meet the increasing demands and commitments and achieving efficiency gains across the board. It is an investment for the future.

VI. Summary of resource requirements for the enterprise systems for the United Nations Secretariat worldwide and request for action to be taken by the General Assembly

A. Summary of resource requirements

105. The following table summarizes the resource requirements (net of staff assessment) for the ERP, CRM and ECM projects proposed in the present report. It is estimated that a total of $308.8 million (at current rates) will be required for the implementation of ERP ($285.6 million, including a contingency provision of $37.3 million), CRM ($8.2 million) and ECM ($15 million) projects.

106. The total amount for the biennium 2008-2009 is estimated at $140.8 million and would be required to implement ERP ($119.6 million, including a contingency provision of $37.3 million), CRM ($7.4 million) and ECM ($13.8 million).

107. It is proposed to fund the regular budget portion of the project under section 28A, Office of the Under-Secretary-General for Management, of the programme budget for the biennium 2008-2009 from the combination of the use of interest accrued, and from the surplus account of the General Fund. In that connection, an amount of $2.3 million from interest accrued under the Integrated Management Information System Fund available at 31 December 2007 would be used to fund the requirements of the ERP project. In addition, the General Assembly would be requested to decide that the provisions for the application of credits under regulations 3.2 (*d*), 5.3 and 5.4 of the Financial Regulations and Rules of the United

Nations shall be suspended in respect of the amount of $21.6 gross ($21.3 million net), which otherwise would have to be surrendered pursuant to those provisions.

108. The remaining requirements for 2008-2009 would be funded from the peacekeeping support account ($89.6 million) and extrabudgetary resources ($27.5 million).

Table 7
Summary of net resource requirements, by project (at current rates)
(Thousands of United States dollars)

	Regular budget			*Peacekeeping support account*				*Extrabudgetary*			
Object of expenditure	*2008-2009*	*To end of project 2012*	*Subtotal*	*1 July 2008 to 30 June 2009*	*1 July 2009 to 31 December 2009*	*To end of projects*[a]	*Subtotal*	*2008-2009*	*To end of project 2012*	*Subtotal*	*Total*
A. Enterprise resource planning[a]	12 348.6	24 898.4	37 247.0	37 355.3	13 685.7	102 913.4	153 954.4	18 934.7	38 177.5	57 112.2	248 313.6
Contingency provision	5 587.0	—	5 587.0	23 093.2	—	—	23 093.2	8 566.8	—	8 566.8	37 247.0
Subtotal	**17 935.6**	**24 898.4**	**42 834.0**	**60 448.5**	**13 685.7**	**102 913.4**	**177 047.6**	**27 501.5**	**38 177.5**	**65 679.0**	**285 560.6**
B. Customer relationship management	1 510.9	—	1 510.9	5 046.7	831.8	831.6	6 710.1	—	—	—	8 221.0
C. Enterprise content management	4 203.6	—	4 203.6	8 438.6	1 175.0	1 174.9	10 788.5	—	—	—	14 992.1
Total	**23 650.1**	**24 898.4**	**48 548.5**	**73 933.8**	**15 692.5**	**104 919.9**	**194 546.2**	**27 501.5**	**38 177.5**	**65 679.0**	**308 773.7**

[a] It is expected that the CRM and ECM projects under the Peacekeeping support account would be completed by 2010.

B. Actions to be taken by the General Assembly

109. The General Assembly is requested:

(a) To endorse the proposals and approach, described in the present report for the replacement of the IMIS system and related ancillary systems in all offices of the United Nations Secretariat, including offices away from Headquarters, regional commissions, peacekeeping and political missions, and other field missions;

(b) To approve the overall cost of the ERP project to be completed during the period 2008-2012, at a total project budget estimated at $286,632,700 gross ($285,560,600 net) (at current rates), including an amount of $37,247,000 for contingency provisions;

(c) To approve the overall cost of the ECM project at a total project budget estimated at $14,992,100 (at current rates);

(d) To approve the overall cost of the CRM project at a total project budget estimated at $8,221,000 (at current rates);

Regular budget

(e) To approve an amount of $23,650,100 under section 28A, Office of the Under-Secretary-General for Management, and $306,300 under section 35, Staff assessment to be offset by an equivalent amount under income section 1, Income from staff assessment, of the programme budget for the biennium 2008-2009;

(f) To approve the utilization of an amount of $2,346,000 of interest accrued under the Integrated Management Information System Fund available at 31 December 2007 for the requirements of the ERP project;

(g) To decide that for the biennium 2008-2009 to meet the three projects, the provisions for the application of credits under regulations 3.2 (*d*), 5.3 and 5.4 of the Financial Regulations and Rules of the United Nations shall be suspended in respect of the amount of $21,610,400 gross ($21,304,100 net), which otherwise would have to be surrendered pursuant to those provisions;

(h) To note that the future remaining requirements in the estimated amount of $25,664,200 gross ($24,898,400 net) for the implementation of ERP, CRM and ECM would be considered in the context of the proposed programme budget for the relevant biennium;

Peacekeeping operations support account

(i) To approve a total amount of $74,707,900 gross ($73,933,800 net) to be financed from the peacekeeping operations support account for the period from 1 July 2008 to 30 June 2009 to meet the requirements of the ERP, ECM and CRM projects as contained in the present report;

(j) To note that the future remaining requirements in the estimated amount of $124,269,700 gross ($120,612,400 net) will be included in subsequent peacekeeping support account requirements for the financial periods until 2012;

Extrabudgetary resources

(k) To note that an estimated amount of $65,679,000 of the total ERP project cost would be financed from extrabudgetary resources;

(l) To authorize the Secretary-General to establish a multi-year special account to record income and expenditures for this project.

Annex I

Customer relationship management system

1. The procurement of leading CRM software has recently been completed. Using this software, ICT Service Management and Facilities Service Management, United Nations Headquarters, are expected to be implemented within 12 months, to urgently replace current aging systems.

2. All the central ICT service providers within the Secretariat, ITSD/Department of Management, the Communications and Information Technology Service, Department of Field Support and the seven offices away from Headquarters, have agreed to adopt standardized business processes using the ICT Infrastructure Library (ITIL), an industry best practice, as the basis for managing their ICT services and to implement the CRM software with little or no customization. Effectively, this means that the software will be ready for implementation in all duty stations and peacekeeping missions, after the initial implementation in New York using a centralized model, whenever technically feasible.

3. Although no additional software development will be needed for the implementation of ICT Service Management in other duty stations, each implementation involves considerable effort in migrating current data to the new software, changing the current business processes and workflows, retraining staff and managing the project. The Secretariat will adopt a cautious and phased approach to replacing existing ICT Service Management systems over a period of two years, after implementation in New York. Resource requirements for implementation at further locations will be considered in the context of the proposed programme budget for the biennium 2010-2011.

4. The Economic and Social Commission for Asia and the Pacific (ESCAP) has already undertaken a detailed business process review of all its facilities related operations. The use of the central CRM system will provide an opportunity to implement the revised business processes and, depending on lessons learned from the implementation in New York and ESCAP, facilities management services will be sought to be standardized at all duty stations.

Customer relationship management in peacekeeping operations

5. Currently approximately 40 per cent of the peacekeeping budget is allocated to establishing military and police capacity in support of mission mandates. Military capacity is achieved through the provision of equipment, personnel and capacity by troop-contributing countries, and requires verification of that capacity and appropriate reimbursement for it. Similarly, Member States provide civilian police components of peacekeeping operations either as individual civilian police personnel or formed police units. The management of the military and police capacity in field missions is a significant undertaking in terms of scale and complexity and integrates the disciplines of finance, logistics as well as strategic and tactical military and police operations. The service management components of these operations will be automated using CRM technology. The project will focus on the management of the lifecycle of activities required to manage and sustain military and police capacity in field missions.

6. At present, the telephone billing review, approval and cost recovery process is highly manual and time-consuming. Analysis of call data is difficult and tracking of the process is cumbersome. In several field missions and in some offices away from Headquarters, this process has been automated using a variety of automation tools, but a single global system does not exist. The Department of Peacekeeping Operations intends to implement an end-to-end standard automated telephone billing process supported by CRM technology that will provide increased accuracy, greater accountability and transparency of the process. The scope of the project is expected to include the automated calculations of calls and costs, clearly defined routing and approvals, and interfaces with telephone switches and financial systems for electronic payment and recovery resulting in savings in time and efficiency.

7. The proposed system will be initially implemented for the Department of Peacekeeping Operations and the Department of Field Support at United Nations Headquarters, followed by an extension to one or two field missions after performance testing. CITS and ITSD will work closely during the requirements-gathering process to ensure that the solution developed can introduce a standardized process across the Secretariat at all duty stations.

8. Another key constituency for the CRM system will be the Permanent Missions. Leveraging the CRM system for other services, United Nations Headquarters and ESCAP will jointly explore the possibility of building a Member States relationship management capacity from both the Headquarters and field perspectives. The project's initial focus will be on the analysis of the interaction of Member States with the Secretariat and the gathering of requirements, to develop a "To Be" set of processes, in consultation with Member States, through the Working Group on Informatics, which has been advocating such efforts.

Annex II

Enterprise content management system

1. The ECM system will be a foundation for consolidating several discrete systems that manage the creation, storage and distribution of content. The migration of current systems to an ECM "platform" will be undertaken over several years, prioritizing them on criticality for business continuity, potential for cost-savings or efficiency gains, and compliance requirements. On this basis, a few important projects have been identified for the initial rollout of ECM.

2. The Official Documents System (ODS) requires upgrading technologically as soon as possible. Migration to an ECM platform will make it more robust in its performance and availability 24 by 7, improve controls over the simultaneous publication of documents in all official languages, and eliminate several cumbersome processes in document handling from multiple duty stations. Further, ODS requires upgrading functionally to allow authoring departments and offices, regardless of geographic location, to collaborate on creation and approval of documents, with detailed audit trails of the review, approvals and translations.

3. Initially, a functionally and technically re-engineered ODS will be prototyped in a lab environment, using a commercial ECM solution. This will enable the Secretariat to standardize the business processes for official documents and embark on an automation of these processes in a later phase.

4. The United Nations Internet site, www.un.org, requires migration migrated to the ECM platform expeditiously as it has become difficult to manage both functionally and technically, owing to the myriad tools and technologies that sustain its current state. The site has evolved over nearly a decade with mainly incremental enhancements; a technological upgrade is necessary for the site to meet the increasing expectations about both its content and its availability.

5. A standard content management system across authoring departments and offices will enable the Department of Public Information to enforce global policies for content creation, publishing and security, standards for presentation and compliance with accessibility requirements, in line with best practices for distributed content management. Such a system will improve the controls, for example, over the release of content to the live environment in all official languages simultaneously, or the retirement of obsolete content.

6. The first phase of the migration of the United Nations Internet website will include the creation of the technical infrastructure and the implementation of web content management in the Department of Public Information and other department offices in United Nations Headquarters that directly contribute their content to the United Nations website.

7. Another priority is to exploit the collaboration capabilities of ECM. These can help Member States and delegations in many of their consultative processes that involve secure, web-based exchange of documents and ideas. Features such as threaded discussions, instant messaging, quick polling, version control and audit trails to track changes, workflows for approval, and so on, can facilitate the coordination of formal and informal agendas and the drafting of resolutions and other outputs of all committees and working groups. Electronic team rooms can be

created nearly on demand, using standard templates, even during the session of a committee or group.

8. Simple or elaborate content classification can also be enabled to facilitate easy retrieval and enhance the institutional memory of the committees and working groups. Such content can also be made available securely to the Permanent Missions based on access rules that can be established by the committees and working groups.

9. A successful enterprise-wide implementation of content management requires strong governance. Therefore, the Secretariat has decided to adopt an industry standard framework, created by the Association of Information and Image Management. The framework prescribes a rigorous ECM implementation life cycle. One of its prerequisites is a "business classification scheme", a classification scheme based on the business of the organization to be used for organizing, accessing, retrieving, storing and managing its information. Such a scheme would need to be easy to use, and yet sophisticated enough to meet the diverse needs of the Secretariat.

Enterprise content management in peacekeeping operations

10. The Department of Field Support, in collaboration with the Department of Management (Information Technology Services Division and Archives and Records Management Section) is currently developing an ECM road map following a strategic analysis of the business needs and the operational and technical environment of the Department. This activity will essentially orient the Department's future ECM initiatives and embed sound practices in them and as such is a foundational element in embracing an enterprise vision. The lessons learned are expected to facilitate the development of similar road maps for other departments.

11. Following the development of the ECM road map, the Department of Field Support will initially address the core document workflows related to the observation and reporting activities undertaken in field missions. Many of the core functions of military observers, civilian police and substantive functions in field missions depend on the gathering of raw data, its consolidation, analysis and finally its formulation into meaningful information. In order to ensure that peacekeepers have the information they require to fulfil their core functions, to ensure information-sharing and greater collaboration and enhanced situational awareness (tactical and strategic) among the geographically dispersed peacekeeping community, the Department proposes to examine and map the associated processes and target an initial implementation in a complex, multifaceted mission in order to identify content management requirement links with mandate. Having analysed the manner in which mandate drives content and the management of that content, repeatable content management models will be developed and applied as appropriate to other field missions.

12. In July 2005, the Peacekeeping Best Practices Section, under the aegis of its Guidance Project, developed a guidance development system centred on a robust Expanded Senior Management Team supported by policy and procedure. The Guidance Project developed a framework of all known activities, numbering in excess of 1,200 activity lines. Set against that framework, the Guidance Project has sought to populate a database of all known guidance material in the Department of Peacekeeping Operations and the Department of Field Support with a view to

creating a central repository which can act as the focus of institutional knowledge. That knowledge is then delivered to staff in the field through the peace operation's Intranet. The ECM solution will facilitate the formulation, enhancement and publication of guidance material and can be leveraged to provide both a structured repository for the guidance material developed to date, including external web-based informational resources, and the tools to foster collaboration in and between field missions, by providing a shared space for subject matter experts throughout peacekeeping field missions.